

THE ART AGENCY · DAILY CHECKLIST

Daily Producer Checklist

Work top-to-bottom every business day.

Mirrors Operations Handbook Appendix A · AMS360 CSR & Producer Operating Guide §24–§25

DAILY ACTIVITY GOAL

4	10	80
ITEMS	**QUOTES**	**CALLS**
per day · items / policies	per day · household quotes	per day · outbound dials

Daily Workflow — Top to Bottom

- ☐ Check Agency Zoom for new leads (respond within 5 minutes during business hours)
- ☐ Review InsurGrid queue for new submissions
- ☐ Return all customer calls and emails from the prior day
- ☐ Update Agency Zoom pipeline stages for all active leads
- ☐ Enter any bound policies into AMS360 (24-hour rule)
- ☐ Process any pending endorsement requests
- ☐ Review the carrier download queue in AMS360
- ☐ Document all customer interactions in AMS360 and/or Agency Zoom
- ☐ Tab through every field on a new account — confirm Executive / Representative are set and Division / Department is correct before accounting posts
- ☐ Use a real policy number or TBD — never a quote number, and never a “Continuous” term
- ☐ Start each new account in one system only — AgencyZoom or AMS360, never both (prevents duplicates)
- ☐ Verify limits against the live policy before sending any eForm or proposal

Producer: _____ **Date:** _____